FSA Modernization Partner Program
Monthly Management Services Summary
For the Month of August 2002

September 10, 2002

81.1.3i - PROGRAM MANAGEMENT SERVICES SUMMARY

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I.   INTRODUCTION

This report covers the month of August 2002 and includes the following:

- Information on overall project completions/implementations for this reporting period.
- Major milestones achieved during the month.
- Program level risks and issues.
- Monthly scorecards.
- Significantly late deliverables.

This report format is the result of a collaborative effort between FSA and Modernization Partner executives to improve the information provided to FSA Executives. We will continue to refine these monthly summaries to improve their usefulness and value. Please provide any suggestions regarding these reports to the FSA Modernization Partner Program Manager (eric.l.stackman@accenture.com or 202-962-0624).

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II.   PROJECT COMPLETIONS/IMPLEMENTATIONS FOR THIS REPORTING PERIOD

This section reports on the completion or implementation of Modernization Partner projects.

WORKFORCE ALIGNMENT

- Completed Task Order 97 – Program Analysis Division (PAD) Modernization Support on August 31, 2002. This task was a follow on to a previous Program Analysis Service Delivery Model task order. This task order provided the Program Analysis Division (PAD) with solutions to implement its service delivery model, structure and carry out projects based on previously identified opportunities, and to establish processes and procedures for on-going analysis activities. The team has delivered:
    - o A roadmap for implementing PAD services and functions over the next two years
    - o Recommended approaches, structures, and high-level work plans for selected projects
    - o Continued best practices research on program management and analysis related to program integrity and benchmarking
    - o Continued communication support to help PAD position itself as an internal service provider to other SFA organizations

  As result of the project, the Program Analysis Division (PAD) has:
    - o Developed closer relationships with the different FSA business units and with the Management Council itself
    - o Delivered value-added studies and analysis for each respective business unit's leadership and for FSA senior leadership as a whole
    - o Implemented operational processes and structures within PAD to allow the entire team to effectively deliver service day-to-day.

III.   VALUE POINTS
This section reports value delivered above and beyond anticipated activities.

STUDENTS
- Implemented Release 1.0 Pilot (1-800-4FEDAID) for CRM4FSA on June 29, 2002 with **10% of inbound call volumes**. The Release 1.0 pilot's main objectives were to:
    o Consolidate nine toll-free numbers into one single number: 1-800-4FEDAID
    o Build a common IVR platform enabling centralized menus and scripting
    o Enable warm transfers between contact centers
    o Capture/analyze enterprise call data to ensure consistent customer service
- Key Results for the CRM4FSA Release 1.0 pilot include:
    o Approximately 5,500 callers per business day
    o 97% choose a menu option
    o 94% get the help they need on the first attempt using the new menu
        ▪ 88% reach the appropriate representative (single purpose call)
        ▪ 6% have a second question requiring a transfer (multipurpose call)
    o 6% are misdirected and need to be transferred

SCHOOLS
- Conducted workforce planning for the development and execution of an eZ-Audit-related quality assurance program for school submitted financial statements and audit compliance reports.

CIO
- SAIG provided an alternative method to Common Origination and Disbursement for Retrieving/Sending messages to support school testing as a workaround solution.
- SAIG established 90 read-only accounts for COD Customer Service and conducted training sessions for users.

PROGRAM MANAGEMENT
- Assisted with the COO transition team by facilitating meetings and crafting briefings.
- Created Consistent Answers briefings to present to the Department.

WORKFORCE ALIGNMENT
- Identified best practice workforce transformation trends from other Federal agencies facing similar workforce issues.
- Supported the Schools Channel in development of a workforce transformation proposal to "in-source" work as a result of the implementation of eZAudit.
- Facilitated the development of CIO core offerings and services to better reflect their more customer-centric service model.

IV.   MAJOR PROJECT MILESTONES

This section presents Modernization Partner's significant accomplishments on a Channel-by-Channel basis. These milestones may include the completion of a project phase or the acceptance of a major deliverable in line with the project's workplan.

SCHOOLS
- Delivered the eZAudit detailed Technical Design on August 19, 2002 – nearly 6 weeks ahead of the baseline schedule. This was done to accommodate early initiation of development (build) activities.
- Completed the Development and Unit Test of Release 2 of the Students& Financial Partners Portals.
- Completed the System Integration Test of Release 2 of the Students& Financial Partners Portals.

FINANCIAL PARTNERS
- Received 1,367 LAP applications as of August 23, 2002.
- Completed the Production Readiness Review (PRR) for the initial release of LaRS on August 28, 2002.

CFO
- Posted July IF010 files at FSA and OCFO. Data transfer between FSA and the Department continued for all other programs and is current through July. On track to deliver all August files to the Department by September 6, 2002
- Completed the Financial Management System (FMS) Accounts Receivable/LARS integration test and began user acceptance testing for FMS Accounts Receivable.

CIO
- Received approval and sign-off by project sponsor for preliminary design from the Definition Phase for NSLDS II.
- Briefed the Management Council regarding recent NSLDS II accomplishments and plans for FY03, including funding estimates.
- Deployed SAIG Release 1.1 into production.
- Completed SAIG testing of next version of EDConnect(v5.2.0).
- Successfully completed the Operating Partners pilot of the Enterprise Configuration Management tool on August 23, 2002.
- Received authorization for the rollout of the Enterprise Configuration Management tool across all of FSA on August 26, 2002.

PROGRAM MANAGEMENT
- Have started holding meetings with FSA leadership to determine next steps for moving forward with the CRM4FSA project.
- Assisted with the development of the OMB 300 Business Cases.

WORKFORCE ALIGNMENT
- Completed and delivered a Training Processes Summary, which summarizes the results of training services provided to FSA University during August 2002. This document recommends improvements to FSA University's training services, processes and systems.
- Summarized significant findings from best practice research and teleconferences with select Federal agencies on Reduction in Force (RIF) issues.
- Developed a detailed process flow for FSA University Homeroom concept and how it incorporates into FSA University's "big picture".
- Created an online demonstration to facilitate usability of the Learning Management System by end users.

V.   RISKS AND ISSUES

This section reports the issues and risks that are currently causing or could potentially cause a very significant impact on the Modernization Partner Program's goals.

Area	Direct Loan eServicing
Description	Implementation delays and low adoption rates in EBPP/EC have resulted in variance from the projected benefits stream.
Impact	FSA is not achieving savings at the rate projected in the business case.
Assistance Requested from FSA	Assistance in defining a way for FSA to recognize the originally planned savings in the business case.
Proposed Solution/ Mitigation Strategy	Potential adoption strategies will be explored by a focused, small group within the channel and the mod partner.
Progress/ Resolution	First meeting was coordinated on September 5, 2002. An action plan is being drafted and will be discussed on September 12, 2002.

Area	FSA Portals Rollout
Description	ED/OGC is reviewing Release 2 of the Students Portal to determine whether it should be classified as a System of Record (SoR)
Impact	If it is determined to be a SoR, Release 2 cannot be deployed on September 30, 2002 as planned. We will have to complete all of the necessary documentation. This could result in a 3-4 month delay.
Assistance Requested from FSA	The Students Channel has been working with ED/OGC to resolve this issue.
Proposed Solution/ Mitigation Strategy	We are preparing an approach to completing the documentation in as short a time as possible.
Progress/ Resolution	We are anticipating the official decision from ED/OGC on September 3, 2002.

VI.   TASK ORDER STATUS REPORT SUMMARY

This section presents an extract of all "Red" assessed criteria. The extract is taken from the Bi-Weekly Task Order Status Reports. (See Appendix VII for the more information on the Bi-Weekly Task Order Status Reports.)

There are no "Red" issues in the Status Report Summary for the month of August.